Project Managers' Advisory Group

MINUTES
February 19, 2007

Attending:

Sharon Hayes	EPMO
Alisa Cutler	EPMO
Bob Giannuzzi	EPMO
Jesus Lopez	EPMO
Gaye Mays	EPMO
Steve Tedder	EPMO
Barbara Swartz	ITS
Charles Richards	ITS
Jim Tulenko	ITS
Todd Russ	ITS
LaQuita Hudson	ITS
Vicky Kumar	DOT
Angela Taylor	DHHS
Lynn Beck	DHHS/DMH
Joe Cimbala	DMH/DD/SAS
David Prince	DOJ
John Gary	NCCCS
Jim Skinner	Dept of Insurance
Sarah Joyner	ESC
Lynn McGarrah	NCDA & CS
Gary Hinkle	OSA

Bob Giannuzzi welcomed everyone to the meeting and asked first-time participants to introduce themselves. **John Gary** from Community Colleges introduced himself.

Bob called for approval of the January minutes – approved.

Jesus Lopez reported that some attendees of the most recent PMP Prep class have scheduled their exams. He also advised that Cycle 5 training will start in April. He said the instructors have been confirmed and the books purchased. The schedule will be put out this week. He mentioned that Corwin Armstrong of DPI is forming a PMP Support Group, which will have weekly review sessions for State employees who plan to take the PMP exam. Handouts with details were passed out. Those interested in participating may contact Corwin at 807-4018 or carmstrong@dpi.state.nc.us.

NCPMI news was covered next. Bryan Groden of Gartner will be speaking on *Fine Tuning the IT PMO* at the 3/1 Public Sector LIG meeting. **Vicky Kumar** reminded members of the Neal Whitten 1-day training session on March 15. She encouraged members to register for the event. **Vicky** pointed out that she and **Cheryl Ritter** will be speaking on a Public Sector topic at the PMI Global Conference in October. **Bob** invited them to use a PMAG meeting for a dry run.

Bob Giannuzzi called for updates from the Task Groups.

- *Monthly Status Reporting -* **Gaye Mays** reported that the team had its final meeting 2/6. **Gaye** reported that all meeting minutes are posted on the EPMO website. An additional one page summary (possibly with graphics) has been proposed and will be discussed with the UMT support team. The team also proposed a process change to require agencies within 90 days to bring projects forward for Gate 1 approval, put "on hold" or cancel the project. If projects meet the 90 day timeframe, agencies will not be required to produce "catch up" reports. This led to a discussion of reporting requirements prior to Gate 1. **LaQuita Hudson** inquired regarding the need to provide manual reports during the time in Initiation. **Alisa Cutler** advised that manual reports are required only when projects are in gate approval and status reports cannot be submitted. However, there may be exception situations where manual reports are required, but these would be on a case by case basis. **LaQuita** asked if manual reports had to entered into the PPM tool and **Gaye** advised that yes they would need to be entered into the PPM tool once the project was "unlocked". **Gaye** informed that the 90-day initiation policy is to be updated and brought back to the PMAG for further review and comment. **Gaye** took the following action items:
  1. review the requirements for gate approval to ensure they are in sync with requirements for status reporting
  2. revisit the value of "catch up" reports irregardless of the time in Initiation
  3. evaluate how the staffing plan is reviewed/rated during the first few months of P&D
  4. review how much detail is needed in the procurement plan for gate 1 approval.

  Angela Taylor will send suggestions to assist with the review process.
- *Workflow* **Jesus Lopez** reported that as a result of several meetings, the group decided to step back to take another look at the process and refocus. **Sharon Hayes** pointed out that the workflow is in place to facilitate investment decisions, while the status reports are for tracking progress. **Angela Taylor** stated that the current procurement plan process doesn't consistently align well with the workflow. **Angela** stated that what is being required of the agency varies depending on which PMA is assigned to the project. **Sharon** asked that PMA inconsistencies be discussed with her so she could follow up with the PMA group. Concerns with report assessment were also discussed. **David Prince** thinks that the variance criteria are too tight in Planning and Design. **Todd Russ** suggested that the first two reports should be rated all green. Two action items were captured:
  1. **Sharon Hayes** will look at status reporting alignment with the workflow.
  2. **Angela Taylor** will offer suggestions to the EPMO on aligning the procurement planning process with the workflow.
- *PM Tools* **Gaye Mays** reported that an overview of the team's activities is posted on the EPMO website. She spoke of a demo of two SAP tools that will be viewed on February 28th. The IBM demo has been placed on hold until after the SAP presentation.
- *Methodology* **Alisa Cutler** reported that the manual status report process and format was approved by the PMAG. The team recommends more training on reporting by EPMO QA. **Alicia** advised they are also working on revising the project closeout process. Todd Russ would like the tool to generate Closeout reports. Sarah Joyner suggested separate closeout requirements for Registered vs. >$500K projects. The work group had also discussed next steps – risk mitigation and procurement plans. **Angela Taylor** asked that a mechanism be put in place where details could be inserted that would assist with lessons learned at the end of each stage of a project.
- *PM Promotion and Education* **LaQuita Hudson** was to discuss direction with **Sharon Hayes** after the meeting.

Bob Giannuzzi passed out the following information on upcoming teleconferences of interest to the PM Advisory Group.   He also read some previews with detail on the topics of particular interest.

Organization/website	Contacts	Upcoming Calls
http://www.nascio.org/committees/projectManagement/documents/PY2007CallSchedule.pdf	Stephan Jamison 859/514-9148 sjamison@AMRms.com Access ***888/272-7337*** *conference ID* ***6916986***	March 6 (3:00) **Measuring PMO Performance**
PMO Executive Council http://www.pmo.executiveboard.com/PMOEC/1,3241,,00.html	Register at website	March 21 (12:00) **Key Trends in PM Career Paths**
CIO Executive Council http://www.cio.executiveboard.com/	Register at website	February 27 (7:00 AM) **Realizing the Potential of IT Employees**
Application Executive Council http://www.aec.executiveboard.com/	Register at website	March 1 (11:00) **Optimizing End-to-End Resource Management**
Infrastructure Executive Council http://www.iec.executiveboard.com/	Register at website	March 1 (7:00 AM) **Problem Management Challenges and Strategies** March 6 (11:00) **Key Attributes of an Effective Service Catalog**
Information Risk Executive Council http://www.irec.executiveboard.com/	Register at website	March 20 (11:00) **Principled Vendor Selection Strategies**
Enterprise Architecture Executive Council http://www.eaec.executiveboard.com/	Register at website	February 20 (12:00) **Increasing EA Responsiveness through Adaptive Architecture Practices** March 8 (12:00) **Targeting EA Engagement with Business Process**

Bob stated that the PM Methodology Group meeting minutes are now posted on the EPMO website.

Bob Giannuzzi spoke about the RFP Lab that was held last week. He reported that **John McShane** said he had received very positive feedback. **Todd Russ** noted that participants had diverse perspectives on how things should be done.

Jim Tulenko reported that Microsoft had provided a new release of the PPM tool. It includes some process changes and additional fields, including Actual date in the Schedule tab. The upgrade was installed in the test environment on 2/16. He asked for volunteers to test the upgrade and give feedback. Testing and training will be executed through the end of March with a Go Live goal of 4/1.

Bob distributed a summary of Lessons Learned (attached) from recently completed projects. He reported as good news that eight projects had been completed since the last PMAG meeting.

Bob asked that if anyone would like to deliver a presentation at an upcoming meeting or can recommend someone to let him know. He observed that several agencies were represented at the meeting and stated that he wants to ensure that the meetings maintain the interest of the enterprise PM community.

Meeting adjourned at 4:31 PM.

Lessons Learned Documentation

Exhibit A

Wildlife Resources Commission - Coastal Recreational Fishing License Implementation

1. **LESSONS LEARNED** - What were the **positive** lessons learned (project strengths) from this effort?

   - A Formalized Change Order process was enacted.
   - Creation of a Roadmap area for future phase requests
   - Coordination efforts between DMF and WRC.
   - Positive vendors relations

2. **LESSONS LEARNED** - What **opportunities for improvements** (project weaknesses) were learned with this project?

- Need to strengthen the development and testing environments
- Need to document process for emergency releases along with scheduled releases

Exhibit B

Office of the State Controller – PCI Security Compliance Program

1. **LESSONS LEARNED** - What were the **positive** lessons learned (project strengths) from this effort?

Competitive bid process resulted in reduced contract unit cost.

2. **LESSONS LEARNED** - What **opportunities for improvements** (project weaknesses) were learned with this project?

Account for EPMO approval process in procurement. However, since this procurement was for a service to be delivered and standard RFP rules were followed, don’t believe this approval added value.

Exhibit C

Department of Transportation - Customer Traffic Management System

1. **LESSONS LEARNED** - What were the **positive** lessons learned (project strengths) from this effort?

Proper planning and communication between all involved parties eases the implementation and operation of the systems.

We trained the trainer, a DMV officer. This eased training of the other DMV offices since he knew what they needed and communicated at their language.

2. **LESSONS LEARNED -** What **opportunities for improvements** (project weaknesses) were learned with this project?

DOT Infrastructure has to communicate their workload and identify projects they are involved with to enable proper allocation of resources. We had to stop the project because the resources had other projects that were planned and had to be completed.

Exhibit D

Department of Revenue - Guest Worker Data Warehouse

1. **LESSONS LEARNED** - What were the **positive** lessons learned (project strengths) from this effort?

   Communication was excellent – the project team was aware of the events as they unfolded, as well as issues, risks, etc.

   Clear role and responsibility definition is key.

   The short cycle time served the team well, enabling resources to focus on immediate deliverables.

2. **LESSONS LEARNED -** What **opportunities for improvements** (project weaknesses) were learned with this project?

   Allocate at least 50% more time (based on this example, rather than 80 days, this would have been a 120 day project) for knowledge transfer and assimilation.

Ensure that there is sufficient time for initial business modeling ("As Is") and a clear understanding of what the "To Be" processes that are anticipated as a result of the implementation.

Exhibit E

DHHS – NCFAST Service Delivery interface

1. **LESSONS LEARNED** - What were the **positive** lessons learned (project strengths) from this effort?

- Developed a clearer understanding of the SB991 process as it relates to a program and the project components.
- Developed good understanding and professional relationship with the Enterprise Project Management Office (EPMO).
- Gained experience with County Case Management System.
- Developed familiarity with DIRM and EPMO project-related templates.
- Elimination of redundant data entry has increased job satisfaction among County Case Workers – source is New Hanover County.

2. **LESSONS LEARNED** - What **opportunities for improvements** (project weaknesses) were learned with this project?

- The initial SDI efforts have highlighted potential risks from the tools chosen to accomplish the proof of concept. While the Quovadx Cloverleaf tool has delivered a successful interface, the limited use of the Quovadx Cloverleaf software has led to resource constraints, and will be reevaluated as the best choice to implement statewide. The ApplinX screen animation tool was a temporary measure to validate the interface concept, and is incompatible with the State's architecture for statewide implementation. The successful implementation of the proof of concept, and the imposed delay to Case Management system implementation has provided the opportunity to evaluate new, more industry-standard tools to leverage as the next SDI effort is developed.
- It would be helpful to have instruction and examples of the proper completion of the DIRM project templates, to eliminate confusion.

- Lessons learned in various projects at DIRM should be shared among the projects. DIRM Project Office can create a shared directory where other projects can share documents.
- Need to identify, during the planning and design phase, skill sets needed by personnel (such as ApplinX and Quovadx) and acquire those skills, either through knowledgeable staff or training, prior to the execution of the tasks in which those skills are needed.
- Development of a realistic overall project plan and ensure that there is enough time for team members to document and estimate the effort of the high-level tasks that make up the project plan.
- Plan for redundancy of knowledgeable personnel by promoting ongoing cross-training of resources.
- Develop, in the communication plan, a process to address timely responsiveness of support teams for defeats and enhancements. Include ITIL methodology as appropriate to provide quality customer service from initiation to closure, including methods to update users.

Exhibit F

Office of State Personnel – NCFlex Web Enrollment

1. **LESSONS LEARNED** - What were the **positive** lessons learned (project strengths) from this effort?

We conducted 2 lessons learned sessions during the project lifecycle. Both of these are documented and a copy of each is on the PPM tool in the document tab.

Good
• Training was well received (need to refine the scheduling process)
• RealLife HR was very responsive to all requests, changes or problems
• Project teams worked well together and finished on time
• Data clean-up was effective
• System works (process needs to be refined)

Positive to be referenced for future efforts:

- The good task plan defined the implementation effort, and with consistent review and follow up, eliminated duplicate efforts.
- The system delivered full functionality based on system design.

- The system works great based on defined acceptance criteria.

- Communication improved as the project progressed and folks began understanding dependencies.

- Folks closest to the core efforts were comfortable with escalating information and believe issues were addressed as they were identified and escalated. These folks conclude their feedback was considered.

- Core project participants took ownership of activities, assigned or not to make sure the project was successful.

- Some time lines were a bit short (but doable).

2. **LESSONS LEARNED -** What **<u>opportunities for improvements</u>** (project weaknesses) were learned with this project?

We conducted 2 lessons learned sessions during the project lifecycle. Both of these are documented and a copy of each is on the PPM tool in the document tab.

<u>Items to be addressed</u>
• Going forward we need to involve each agency / university / community college earlier in the process
• Self registration process is time consuming
• Initial login loading process was an issue for a few days (12 seconds to load initial page)
• Receiving employee eligibility files
• Disclaimer too long
• Termination processing

Negative to be considered and improved upon or avoided in future efforts:

- All primary stakeholders should be identified and should provide acceptance criteria mapped to user requirements.

- A communication plan should be defined to include “who” should participate in meetings and what roles to take during meetings. This should be defined at the beginning of the project. This plan should be evaluated throughout the project life cycle to confirm needs are being met and that communication is effective.

- Meetings should always be documented and notes published to all planned attendees. The notes serve a dual purpose. First is to ensure everyone who attended the meeting agrees to documented approvals and plans. Second to ensure absent attendees know what transpired in the meeting.

- Regular meetings should be held throughout the project. These should be face to face as circumstances allow.

- A clear and effective escalation plan must be defined and communicated to all project participants in the beginning. Project participants should be able to raise concerns as well as note positive actions as they are identified.

- It is critical to identify dependencies for deliverables and understand and communicate any impact to the timeline when these dependencies are not met according to the plan. The plan should be modified to reflect the impact.

- An effective culture change management plan should be defined and executed to ensure end users are aware of the system implementation. The business owner should ensure end users are introduced to the system functionality prior to receiving the system. End users should receive information consistent to what other end users are getting, and they should understand how their job will be impacted.

- Training should be scheduled in advance of implementation but within acceptable time so that folks do not forget what they learned. A suggestion of 2-weeks in advance of rollout is made.

- Key stakeholders should be made aware of key project deliverables. Each stakeholder should impose their input as needed to guarantee deliverables meet user requirements.

- The Project Manager should have authority to manage the project using project management best practices.

Exhibit G

DHHS Disability Determination Services Section - Telephony Upgrade

1. **LESSONS LEARNED** - What were the **<u>positive</u>** lessons learned (project strengths) from this effort?

    - Support from DIRM
    - Collaboration within the DDS

2. **LESSONS LEARNED** – What **<u>opportunities for improvements</u>** (project weaknesses) were learned with this project?

    - Start the SB-991 process early because of the length of time for approval
    - Provide assistance with those units who are having their first experience with the SB-991 document.
    - Educate vendors on the NC Project Portfolio Methodology
    - Scheduling conflicts with outside resources
    - Vendor have all necessary hardware and software at the time of installation

Exhibit H

Voting Equipment Upgrade HAVA (Help America Vote Act)

1. **LESSONS LEARNED** - What were the **positive** lessons learned (project strengths) from this effort?

    - The positive lesson learned was that it was easier to work with one vendor to across the state in the planning, setting up and reporting of results statewide. In the past working with multiple vendors resulted in many inconsistencies.

2. **LESSONS LEARNED** - What **opportunities for improvements** (project weaknesses) were learned with this project?

    - The negative lesson was that with one vendor we lose a lot of leverage negotiating with the vendor.